

A Leading Platform & Innovator

Kaj af Kleen, Chief Technology & Product Officer

#EuropeanStreamingChamp

We've been leading innovation in streaming for 10+ years

2007-2012: Getting the basics right & setting the foundation for success



First to market in the Nordics with our HD quality OTT streaming service (originally called Viasat OnDemand – later renamed to Viaplay).



Spent time securing rights for internet distribution & making customers aware of the "anywhere, anytime" proposition.



Established our service across a range of apps & devices while focusing on enabling high quality video over the open internet.

2012-2016: Focusing on functionality & establishing trust



Viaplay streams the Sochi Winter Olympics in 2014 & Rio Summer Olympics in 2016, demonstrating our strong live sports capability.



New & improved features are continuously released across an expanding range of devices. Download-to-go, continue watching & autoplay next episodes are key for user experience.



New business models are developed with our rent & buy store, add-on packages & pay per view alongside support for a growing number of creative distribution partnerships.

2016-2020: Building a premium experience & preparing for expansion



Viaplay scales to deliver even more live sports per year & asserts itself as one of the largest live sports broadcasting platforms globally with more than 50,000 hours.



Emphasis on personalising our product with the rollout of unique user profiles, refined search & recommendation algorithms plus more targeted D2C messaging.



Launched Viaplay in Iceland & announced plans for further expansion in the Baltics (Q1, 2021) – demonstrating our mature product & software capability.



Our numbers speak for themselves

2018-2020

**Average active days
per user +15%**

B2B & D2C TM subscriptions, Jan-Sep 2018 vs Jan-Sept 2020

**Our share of power
users +9%**

TM segment, Jan 2018 to Sept 2020. Power users are loyal customers who consume 2+ titles per month

**Platform availability
+99.95% every quarter**

NENT SLA measures overall customer accessibility to Viaplay service — including access to key sport, series & movie events across all devices

2020

**Power users' viewing
minutes +10%**

TM segment, power family & power no kids across all content, Jan-Sept 2020 vs Jan-Sept 2019

**Average churn -0.4
percentage points**

Overall churn from Jan-Sept 2020 vs Jan-Sept 2019

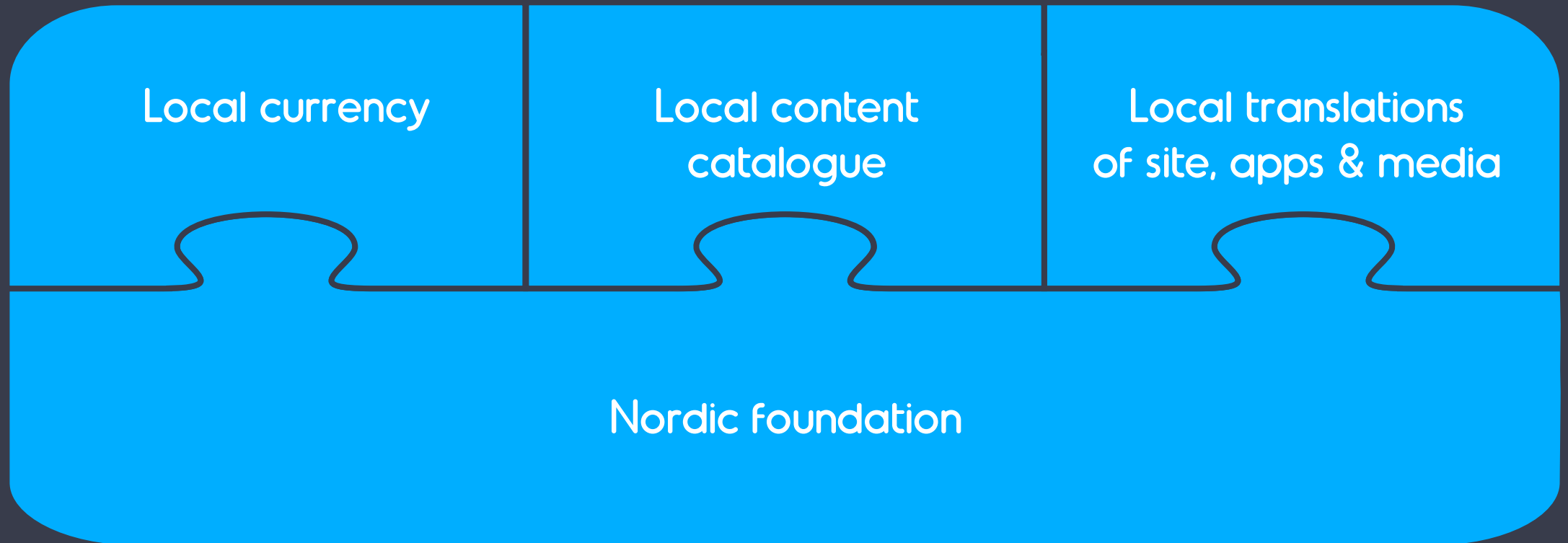


This is a solid foundation for expansion



After years of development we're proud to say Viaplay now sits at the intersection of **customer desirability**, **commercial viability** & **technical feasibility**.

Our launch in the Baltics will rely on extending our Nordic foundation





How do we secure our competitiveness?

1.

Customer focus

2.

Learning culture

3.

Data capabilities

4.

Elasticity & resilience

5.

Talent attraction
& retention



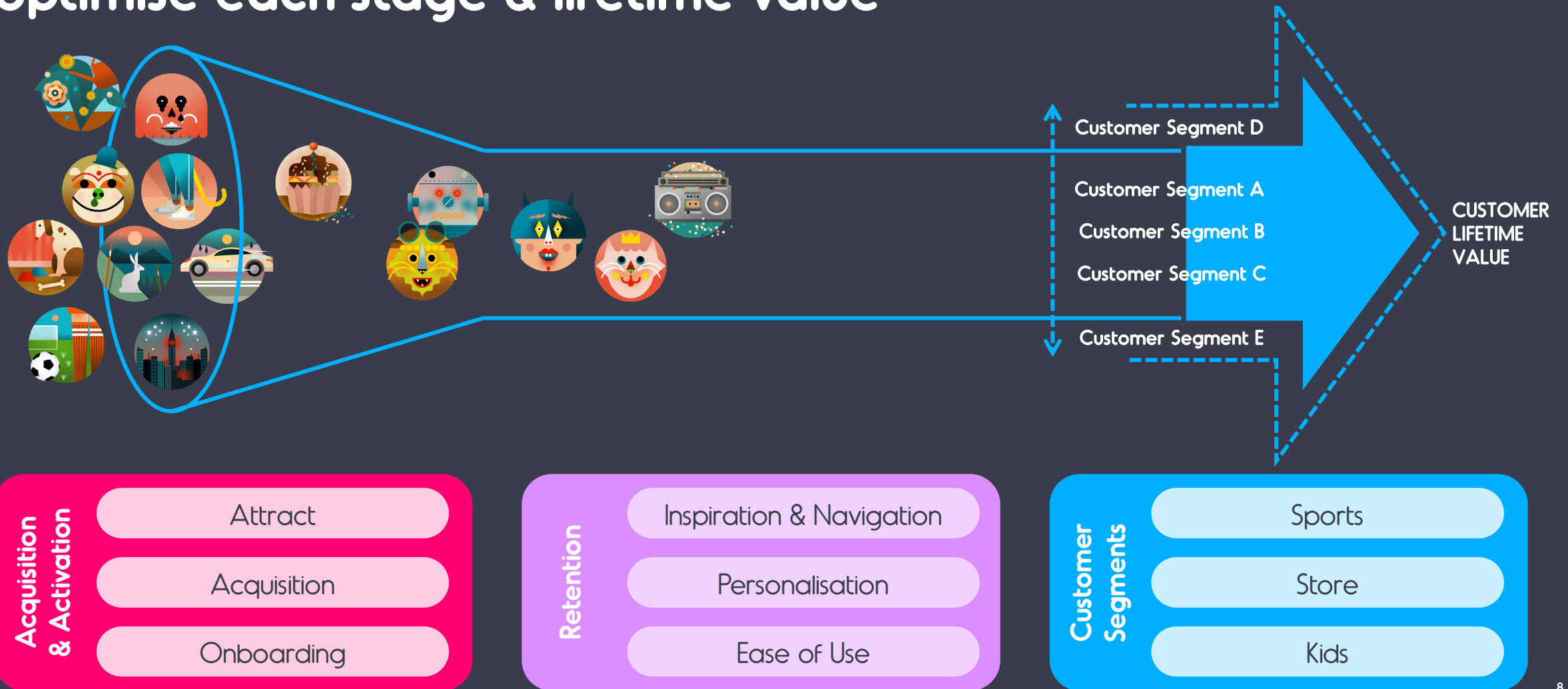
How do we secure our competitiveness?

1. Customer focus

By turning everyone's attention towards our users, we make sure to build the right solution in the right way at the right time, using all available resources to deliver on our brand promise & secure return on investment.



Our teams are organised around a customer funnel to optimise each stage & lifetime value





How do we secure our competitiveness?

2. Learning culture

Iterating in fast feedback loops is at the core of what we do; informed by usability interviews, focus groups & A/B testing. We act quickly, without fear of breaking things, by running a continuous integration pipeline where value is always being added.

We balance our research & experimenting with deploying features & fixes



User research



A/B testing



Continuous integration



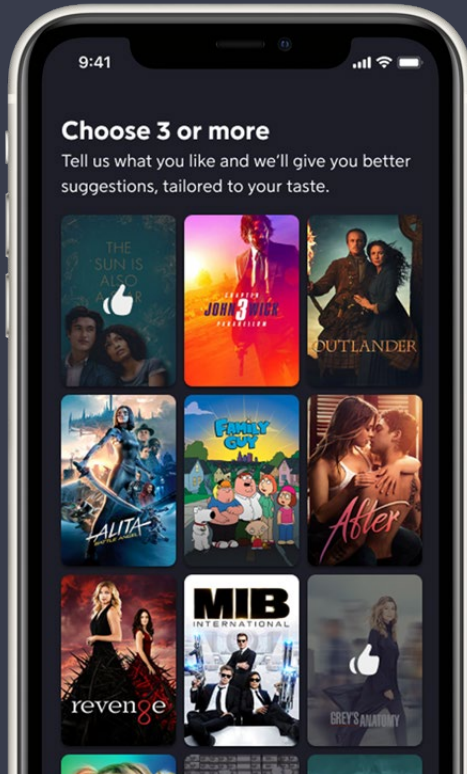
How do we secure our competitiveness?

3.

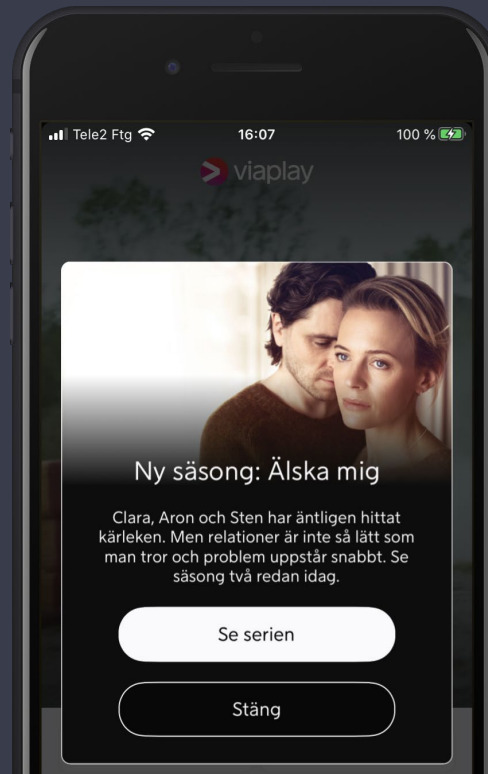
Data capabilities

Investing in our data capabilities allows us to build intelligent products with a high degree of personalisation & automation. It translates into more precise communication & targeted advertising – plus more informed employees across all levels of the company.

Our products are powered by user-generated insights & increasingly cut through the clutter



Building intelligent products



Personalised communication



Informed teams



How do we secure our competitiveness?

4.

Elasticity & resilience

Cloud infrastructure enables elasticity where scale is added/removed as required in a cost effective way. Our constant focus on delivering unparalleled up-time with a robust, resilient & secure platform is critical for retaining trust amongst our users.

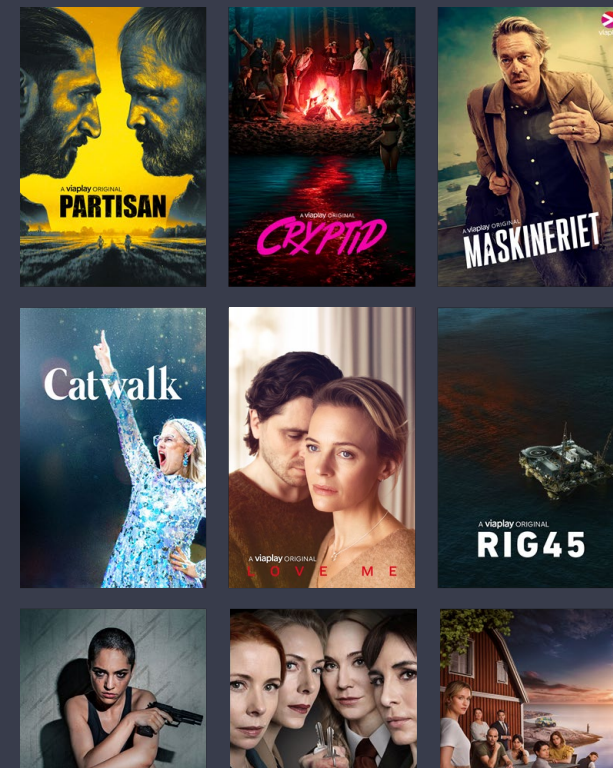
An elastic platform allows cost-efficient scaling while resilience is at the core of gaining trust



Cloud-based infrastructure



Availability



Content protection

How do we secure our competitiveness?

5.

Talent attraction & retention

Asserting ourselves as a main player on the job market through a strong brand proposition & an attractive engineering environment. We believe diverse & inclusive teams will ultimately yield the best results & foster a culture of innovation where ideas flourish.

Tech recruitment is highly competitive & we know the key to success is cultivating a strong culture



Employee engagement



Technical capability



Diversity & inclusion



Wrap-up

Robust & flexible platform

Learning & data-centric culture

Customer value



Follow us



@nentgroup



@nent_group

nentgroup.com